



Exercise Guide for
PA370
Short Term Disability

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Log onto BEACON SAP



Scenario

You need to log on to the BEACON SAP training client so that you can complete course exercises.

Instructions

Use the steps below to log on to BEACON SAP in the classroom.

1. Access the BEACON SAP portal web page.
2. At the Welcome screen, enter the User ID and password that is assigned to your classroom PC.
3. Click the Log on button.
4. Click the SAP GUI TRAINING tab.
5. Click the training client number specified by your instructor. If you receive a copyright pop-up notice, click the green check to close the pop-up.
6. Stop when you have reached the Easy Access screen.

- ☒ It is important that you complete all of the exercises in their entirety because some subsequent exercises depend upon the data that you entered in previous exercises.
- ☒ In each of the exercises that follow, you will receive a delimit message on the infotypes because you are entering data on an existing employee. After you read and verify the warning message, press Enter on the keyboard to bypass it.

Instructor Demonstration – Leave of Absence - STD 60-day waiting period

ZPAA076

Scenario

Diane Burger an Administrator at the Museum of Cape Fear has been approved for short-term disability effective today due to an illness. She is exhausting 40 hours of vacation leave during her 60-day waiting period.

Instructions

The instructor will use the scenario and steps in the Student's Exercise 2.1 to demonstrate.

Exercise #2.1 – Leave of Absence STD - 60-day waiting period

ZPAA076

Scenario


Diane Burger, an Administrator at the Museum of Cape Fear, has been approved for short term disability effective today due to an illness. She is exhausting 40 hours of vacation leave during her 60-day waiting period.

There are three parts to this Exercise. You are responsible for I and III.



- I Initiate Workflow (WF)
- II Wait for the instructor or navigator to approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.






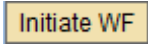

- Log onto SAP using the **Initiator** user id and password.
- On the Easy Access screen, type **ZPAA076** in the Command field.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel No.	Use the Data Sheet personnel number assigned to your student number.
Effective on	Today's date
Action Type	Leave of Absence
Reason	Short-Term Disability 60 day waiting period

- Click Enter .
- Click Create . The second screen of the Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Annual Salary	Same as current (hint: look in Current column)

NOTE: Observe there is a field that will not be used now, but will be used later when a Separation Action is processed: Last Date Worked.



8. Click Enter .
9. Click Save . The Information pop-up displays with the assigned PCR number.
10. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
11. Click  to close the pop-up.
12. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
13. Select Create > Create Note.
14. Enter a note title.
15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.
16. Click the green check  to close the notes. If applicable, close the notes icon menu.
17. Click . The Information pop-up displays indicating that the PCR has been submitted.
18. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).


Part II – Watch as the Instructor demonstrates the two approval levels (Agency and Funding)

There is only one level of approval for an LOA:



- Agency Approver

Part III – Process Approved PCR as Initiator

1. From the Easy Access screen, click SAP Business Workplace .
2. Click the node beside Inbox  Inbox to expand it.
3. **Before you process the PCR, make a copy of the note** in order to paste it into the Actions infotype:
 - a. Select (**do not double click**) the Workflow to select it.
 - b. At the bottom of the screen, click the “header” (not tracker) link: PA PCR xxxxx ##### (where X and # represent employee’s name and PCR number).
 - c. At the Employee Action Request screen, click the Services for Object button to review the notes or attachments.
 - d. Select Attachment List.
 - e. Highlight the line item for the note.
 - f. Double click or use the eyeglasses.

- g. Highlight the entire note, including the title.
 - h. Right click and select Copy. You can either keep the copied note in the clipboard for use later, or paste it to a Word document for later use. **Do not leave the PCR open in a second session.**
 - i. Click X to close the Display note popup.
 - j. Click X to close the Services for Objects popup. . **It is a best practice to make sure the PCR is closed before you process the approved PCR Actions** because an open PCR uses a lot of memory
 - k. Click the Back button.
4. With the PCR still selected, click the Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
 5. On the Personnel Actions screen, enter:



Infotype/Field	Value
From	Today's date
Action Type	Leave of Absence

6. Click Enter .
7. Click Execute .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

8. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF

9. Click  (Enter).
10. Click  (Save) to save the action.
11. At the Organizational Assignment infotype, complete the following fields:

Field	Value
Organizational Assignment	Contract field: SHP-STD < 5 Rtmnt

12. Click  (Enter). A delimit message is displayed.

13. Click  (Save).

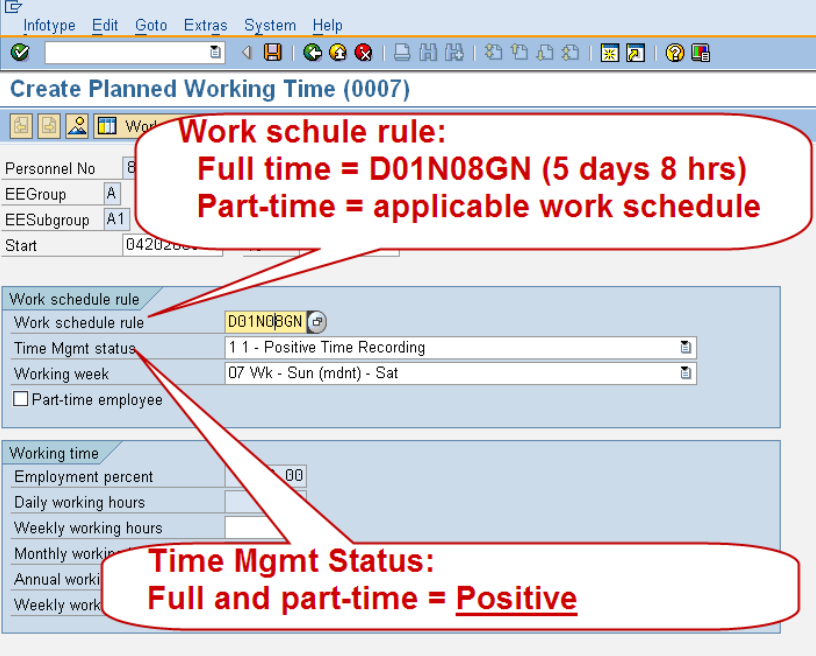
Field	Value
Create Monitoring of Tasks	<p>Task Type: From the drop down menu, select S/T Disability 60-day.</p> <p>Date: Enter a date that is the end of the 60 day waiting period</p> <p>Comments: Use Edit > Maintain text and enter the following note:</p> <p>Employee is expected to return from 60 day waiting period.</p> <p>Click Save to save the note.</p>

14. Click  (Enter). If applicable, change the reminder date to an applicable date.


15. Click  (Save).

Field	Value
Delimit Objects on Loan	<p>In your work environment, follow your Agency's procedure. If your Agency does not require employees to return items, then you will select Next Record to skip the infotype.</p> <p>For this scenario, assume the employee returned the items on loan. Click the blank square beside the line item to select it.</p>

16. Click  (Delimit).


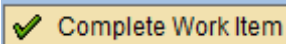
Field	Value
Planned Working Time (0007)	<p>If necessary, make the following selections:</p> <ul style="list-style-type: none"> Enter D01N08GN in the Work schedule rule field. Change the Time Mgmt status to Positive Time Recording  <p>IMPORTANT!</p> <p>All full-time employees must be on a 5 day 8 hour per day work schedule. The easiest way to accomplish this is to use D01N08GN. Part-time employees can be kept on their applicable part-time schedule.</p> <p>All employees whether full-time or part-time <u>must</u> be positive time recording.</p> <p>When you reinstate an employee, the 0007 infotype appears as part of the Reinstatement Action. You will at that time assign the employee to the applicable full-time or part-time work schedule, and also change the Time Mgmt Status field back to negative time if the employee was negative time prior to LOA.</p>

17. Click  (Enter).

18. Click  (Save). A pop-up box is displayed for Infotype Absences.

19. Select **9000 Approved Leave** for this scenario. If an employee is not using leave during the LOA, you merely click the X to close the Infotype Absences pop-up.

Field	Value
Create Absences (2001)	Use today's date (start of employee leave). NOTE: If you had closed the pop-up for Infotype Absences (see previous step), the Create Absences infotype would not display.
Start	
To	<p>Enter a date that you estimate is appropriate for the hours the employee wants to use. . In our exercise, the employee is using 40 hours.</p> <p>Press Enter.</p> <p>The applicable number of hours and days should default in the appropriate fields. If necessary, change the end date so that hours and dates calculate correctly.</p>

20. Click  (Save). The Collision pop-up box is displayed again.
21. At the Time Quota for Compensation pop-up box, click the X to skip the infotype. You are returned to the Personnel Actions screen.
22. Click the back button at the Personnel Actions screen. The system automatically returns you to Personnel Actions when you finish the last infotype within the Action.
23. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

When you place an employee on LOA STD 60 day waiting period, what date would you use on IT0019 Monitoring of Tasks and why?

A.

Question 2

Which Action and Reason would you use in this scenario? The employee went out on FMLA 80 days ago. You just now received the paperwork that verifies the employee is entitled to STD back to 80 days ago.

- a) LOA Action; STD Leave
- b) LOA Action: STD Extended
- c) LOA Action; STD 60 Day Waiting Period
- d) LOA Action: STD Regular
- e) No new Action is needed; the employee is already on LOA

A:

Question 3

True or False. An employee may have plenty of leave, but cannot exhaust leave while out on the 60 day waiting period.

A.

This exercise is complete.

Exercise #3.1- Leave of Absence STD - Regular

ZPAA076

Scenario


It has been 61 calendar days since Diane went on STD 60-day waiting period. She is not planning to use leave for her continued absence. A new LOA with the STD Regular needs to be created. When contacted, Diane indicated she thought she would be back within 12 months.

There are three parts to this Exercise:



- I Initiate Workflow (WF)
- II Wait for PCR to be approved
- III Process Approved PCR

Part I – Initiate Workflow (WF)



Access the Business Process Procedure (BPP) from Help > BEACON Help.




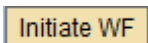

- Type **ZPAA076** in the Command field on the Easy Access screen.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel No.	Use the Data Sheet personnel number assigned to your student number—same employee as previous exercise.
Effective on	61 days after the first LOA in the previous exercise
Action Type	Leave of Absence
Reason	Short-Term Disability Regular

- Click Enter .
- Click Create . The second screen of the Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Annual Salary	Same as current




- Click Enter .
- Click Save . The Information pop-up displays with the assigned PCR number.

9. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
10. Click  to close the pop-up.
11. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
12. Select Create > Create Note.
13. Enter a note title.
14. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.
15. Click the green check  to close the notes. If applicable, close the notes icon menu.
16. Click . The Information pop-up displays indicating that the PCR has been submitted.
17. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).

Part II – Approve PCR – Instructor or Navigator

- Only the Agency approver is required for a LOA.

Part III – Process Approved PCR as the Initiator

1. Click SAP Business Workplace  from the Easy Access screen.
2. Click the node beside Inbox  to expand it.
3. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
4. Select the PCR you want to process.
5. Click Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
6. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Use the same date that you used on Workflow
Action Type	Leave of Absence


7. Click Enter .

8. Click Execute .


NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF

9. Click  (Enter).

10. Click  (Save) to save the action.

Field	Value
Organizational Assignment	Contract field: SHP-STD < 5 Rtmnt


11. Click  (Enter). A delimit message is displayed.


12. Click  (Save).

Field	Value
Monitoring of Tasks (0019)	Task Type: Select estimated return date
	Date of Task: 30 days (from the effective date of the Action). It is a best practice to follow-up on employees who are out on leave every 30 days. Comments: Use Edit > Maintain text to write the following comment: Check status of employee. Employee originally expected to be out for 12 months.

13. Click  (Enter). If applicable, change the reminder date to an applicable date.

14. Click  (Save).

15. At the Planned Working Time infotype, click  (Save)—the data should have populated from the original LOA Action.

16. At the Absences pop-up window, click X to close as the employee is not exhausting leave during this LOA.
17. At the Time Quota Compensation pop-up, click X to close as there is no pay-out on this LOA. You are returned to the Personnel Actions screen.
18. Click the back button at the Personnel Actions screen. The system automatically returns you to Personnel Actions when you finish the last infotype within the Action.
19. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item  **Complete Work Item**. **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

Which Action and Reason is applicable if the employee is still out on STD leave after the 60 day waiting period, but has no leave to use while out?

- a) LOA Action; STD (Leave)
- b) LOA Action: STD Extended
- c) LOA Action: STD Regular

A:.

Question 2

What responsibility does the Agency have if the employee is out longer than 6 months on Regular or Leave and goes on long-term disability? Where would the Agency get the information to handle that responsibility?

A:

Question 3

Which Action and Reason is applicable if the employee is still out on STD leave after the Regular leave has expired and is eligible?

- a) LOA Action; STD (Leave)
- b) LOA Action: STD Extended
- c) LOA Action: STD Regular

A:

This exercise is complete.

Exercise #5.1 – 2010 Process- Employee Remuneration


PA30

Scenario


Diane's Form 703 has been approved and signed by the Doctor. Enter the wage type and amount so that Diane can receive her STD payment. Since this is a PA30 transaction, it is not initiated via Workflow.

NOTE: Each time a 703 is signed by the doctor and returned to the STD Specialist, an IT2010 is created.

Instructions

1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Infotype	2010

3. Click  (Enter).
4. Click Create.
5. Complete the following fields:

Field	Value
Date	The first of next month for this exercise (in your work environment, use the date that the doctor actually signed Form 703)
Wage Type	From the drop-down menu, select 1332 (STD 1st 6 months) . It is important to remember that the Wage Type you choose is determined by the years of service the employee has as of 8/12/1989. The code you select determines if the employee's benefits are subject to State taxes or not.
Amount	\$1813.00 (Reflects amount calculated from Forms 714 and 711)

6. Click  (Enter).
7. Click  (Save).

Questions

Answer the following questions.

Question 1

In addition to whether or not you are entering remuneration for the 1st or 2nd 6 months, what other factor must you consider when choosing the Wage Type?

A.

Question 2

True or False: Benefits are subject to State tax for employees who have more than 5 years of service as of 8/12/1989.

A. This exercise is complete.

Exercise #6.1 – Separation Pay Continuation- STD

ZPAA076

Overview

Position number IT0000 - Actions

In the Separation Pay Continuation, BEACON SAP does not default the position to 99999999. You must manually change the position to the default value in order for the position to show as vacant. **Do not change** the position number to 9s in **Workflow**. You **change** the position number to 9s **on the Actions infotype** when you process the approved PCR (Personnel Actions).

Assignment button IT0001 – Organizational Assignment

On a Separation Pay Continuation during the Action, you must use the Assignment button on IT0001 to enter the Org Unit number of the highest level of org unit that you have access to (which may be the same Org Unit as the employee was assigned prior to Separation Pay Continuation). If you fail to process this step, you will not be able to create a Separation Workflow.

Effective Date

The State of North Carolina defines your effective separation date as the last day you are still an employee. BEACON SAP defines it as the last day you are no longer an employee. DO NOT add a day to the Employee Action Request, nor any of the infotypes in the Personnel Action (except 0416). BEACON SAP automatically adds one day to the last day worked within the action. However, you must change the date on the Create Time Quota Compensation (0416) infotype to the effective date of the Action. This infotype only displays if you selected a leave payout subtype.

Monitoring of Tasks

Create a PA30 Monitoring of Tasks to remind you at the end of the pay continuation to go in and initiate a regular Separation. For the following exercise (Inez Hayes), you would enter a due date that is 4 months from the Separation Pay Continuation Action to remind you to execute a regular Separation on that date. If the Separation Pay Continuation is for a law enforcement office, enter the date of the task **as the last date of the month** in which the employee turns 62, with a reminder 2-3 weeks prior that you must complete a regular Separation. If the law enforcement employee is on Separation Pay Continuation and dies prior to his or her 62nd birthday, a Separation would need to be created.

Scenario

Gilbert Catalano works in an Agency that allows employees to be separated with pay for a specified period of time instead of going on leave for short-term disability. Gilbert will be allowed to continue pay for 6 months, at which time a decision will be made concerning his situation.

Process the Separation Pay Continuation for Gilbert with a reminder to cancel the pay at the end of 6 months.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Wait for PCR to be approved
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, initiate Workflow using the applicable data:
 - Date: Today's date
 - Action Type: Separation Pay Continuation
 - Reason for Action: Separation Short Term Disability
 - **Don't forget to enter the date in the "Last Day Worked field" of the second screen on Workflow**

Part II - Approve PCR – Instructor or Navigator

- Both the Agency and Funding approver roles are required for this exercise.

Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Separation Pay Continuation
 - Copy Actions: Change the Position field to: 99999999. You only change the position number to 9s when processing Separation Pay Continuation. You change to 9s on the Actions infotype and not on Workflow. On a regular Separation, BEACON SAP changes the position number to 9s automatically.
 - Organizational Assignment: Click Yes to create Vacancy.
 - Click the Assignment button.
 - Click the Organizational Unit radio button.
 - Enter: 20010337 (for this scenario. In your work environment, enter the Org Unit number that represents the highest level of the Org structure to which you have permission.
 - Click Continue. You are returned to IT0001. If necessary, enter 99999999 in the position number field.
 - Click Save.
 - Copy Date Specifications: Save after you verify the last day worked is correct.
 - Cost Distribution: Save
 - Infotypes for Time Quota Compensation pop-up, select: Vacation Payout.
 - Infotype 0416: **Change the date to the effective date of the Action. This is the only infotype on which you change the date.**
 - In the No. to Compensate field, enter the same number of hours that are showing in the Rem. Column.
 - Delimit items on loan.
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

Why is it important that you create a Monitoring of Task 0019 when you process a Separation Pay Continuation?

A.

Question 2

What step must you manually perform on the Actions infotype and Organizational Assignment infotype when processing a Separation Pay Separation?

A.

Question 3

In reference to the answer to #2 above, is it necessary that you perform the same step when you process a Separation? Why or Why not?

A.

This exercise is complete.

Exercise #6.2 – Separation

ZPAA076

Scenario

It is now 6 months from the previous exercise. When you ran the Date Monitoring report, a reminder about Gilbert Catalano displayed indicating that his 6 months of pay continuation is ending today.

Create a Separation Action with the applicable reason to end the pay continuation for Gilbert.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: 6 months from the previous exercise
 - Action Type: Separation
 - Reason for Action: Cancel Separation Pay Continuation
 - **Don't forget to enter the date in the "Last Day Worked field" of the second screen on Workflow (enter the same date as was used on the Separation Pay Continuation Action).**

Part II - Approve PCR – Instructor or Navigator

- Both the Agency and Funding approver roles are required for this exercise.

Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Separation
 - Date Specifications: Delete the last day worked in the lower right corner. The last day worked was when the employee was separated with pay continuation, which is already populated in the last day worked field in the upper left.
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

What would be the result if you did not process a Separation for the employee?

A.

This exercise is complete.

Exercise #7.1 – Reinstatement

ZPAA076

Scenario

Assume it is now 9 months since Diane Burger went out on leave. If you remember from previous exercises, Diane was first on LOA – STD 60 Day Waiting Period, and then she went out on LOA – STD Regular (because she was not exhausting leave while out).

Diane has fully recovered and is returning to work.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Wait for approved PCR
- III Process Approved PCR

Instructions Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, initiate Workflow using the applicable data:
 - Date: 9 months from today
 - Action Type: Reinstatement
 - Reason for Action: Return from STD Complete

Instructions Part II – Wait for Approved PCR

- Both the Agency and Funding approver roles are required for this exercise.

Instructions Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Reinstatement
 - Planned Working Time: The employee is working 10 hours a day Monday – Thursday; is off Friday, Saturday and Sunday, and is a negative time employee.
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

Since you got approval via Workflow to place an employee on LOA, is it necessary to submit Workflow to bring the employee back to work from LOA? Why or Why not?

A.
